



InterWorks Service Definition

G-Cloud

Friday, 03 May 2024

Our five elements of Business Intelligence

We design and develop systems that deliver the right data, at the right time, to the right people

Strategy

We'll understand the needs of your people who will use data to do better business. Our aim is to advise, plan and guide you through platform selection, data governance and security to successfully deploy your analytics.

Development and Engineering

We develop new data ingestion pipelines, optimize your database / warehouse, troubleshoot your platforms and create best-in-class dashboards to bring impact through analytics.

Training and Support

Long-term success requires focused education and dedicated support. Our workshops and training curricula develop your team's fundamentals, bring fresh ideas, simplify the latest techniques and help hone their approach.

Architecture

Our platforms architects will work with you to optimize performance, scalability, security, and accessibility of your analytics infrastructure. Our data architects will make sure you have access to high-value data that you trust.

Products and Accelerators

Curator is your single point of access for all your cross-platform analytics. Our aim is to jumpstart your data design, usage and Centre of Excellence.

InterWorks' support packages range from 24/7 platform management to on-demand cross-platform consultation. Combine enablement and support for sustained analytics success.

Who we are

We design and develop systems that deliver the right data, at the right time, to the right people

InterWorks is a trusted BI services partner and data innovation team. We're data strategists, analytics experts, solution architects, platform engineers and product builders.

InterWorks approaches each experience with a fresh perspective. We bring diversity, collaboration and customization to the mix, and it all starts with our people. Our talented teams are the perfect collaborators for any data project – not just because of their expertise, but because they understand the importance of reducing complexity and having trusted experts by your side.

Together, we help you produce your strongest work. If you're ready to do data your way, InterWorks is the ideal partner to get you there.

Recognition

These are just a few awards we're proud of from recent years:

- First Tableau Gold Partner
- Snowflake Partner of the Year
- Tableau Partner of the Year
- Tableau Training Partner of the Year
- Tableau APAC Partner of the Year
- Tableau EMEA Partner of the Year
- Ingram Micro Cloud Partner of the Year
- Inc. 5000 Fastest-Growing Private Companies

Partnerships



Tableau



dbt



Snowflake



Microsoft



ThoughtSpot



Dataiku



Alteryx



Matillion



Fivetran

Engagement vision

Our understanding of your requirements

InterWorks will join your team – we know that great solutions take a combination of skillsets. Our consultants are team players capable of supporting your project from end to end.

Starting with bare metal or a blank canvas, our Solutions Architects can guide technology selection, cloud integration and data infrastructure to provide a scalable and high-performance analytics platform

Innovate and evolve with new and larger data streams designed by InterWorks' Data Architects. We'll join business and tech stakeholders to design and deploy data structures that provide maximum utility and performance

Data should be both beautiful and insightful Our Analytics and Experience Consultants will create a compelling and engaging visual landscape driven by a simple design ethos

Training and enablement are key to our success Our focus will be on guiding and mentoring engagement partners within an environment of continuous learning and creation. By embracing emerging practices and technologies, development will continue long after we're gone



Engagement Leadership

We'll help translate strategy into action, provide visibility into progress, call out resource constraints and create predictable success.

Milestones

- Joint engagement kickoff between InterWorks and your teams
- Define key roles, responsibilities, and escalation process
- Identify and maintain delivery framework
- Guide engagement teams towards defined critical milestones
- Coordinate team action, check-ins, and assignment towards milestones
- Capture best practices derived throughout engagement
- Document and track project progress
- Provide regular project status and burn reports
- Ensure complete engagement knowledge transfer, audit, and documentation
- Manage handover of all project assets and collateral

Dependencies

- Access to necessary project management toolsets
- Defined meeting cadence with project sponsors

InterWorks PRO

Looking to establish a culture of success in your analytics team? **It's time to take the team PRO**

InterWorks PRO delivers an ongoing evolution of exclusive offerings and customized services to meet the needs of our community members.

As a combination of a customer success program, exclusive training centre and enablement planning hub, PRO was developed specifically to achieve your most ambitious business goals by bringing people and technology together.

Any organization looking to institute a strong and motivated analytics team will benefit from the support of InterWorks PRO by meeting the annual minimum requirements associated with your licensing, or via a paid membership.

What to expect

The first step is a kick-off and planning meeting to officially launch the program. We'll review the details with your team, get a better understanding of your environment, and alignment of the offerings to your priorities. It also gives us a chance to plan as much as possible to ensure timely execution towards a successful year.

Exclusive access and rewards

- Real-time access to your dedicated account and planning teams
- Priority engagement scheduling
- PRO Webinars and community events

Flexible training and development workshops

Choose from a range of Strategic and Technical workshops to build a best-fit training and development program for your team.

Support and targeted services

- Access to Assist, our on-demand support service
- Server Upgrades, Platform 360 Server Evaluation and other tailored services can be included in your membership.

InterWorks PRO eligibility

Tier	Size	What's included	List price	Discounted package cost	Licensing credits (ACV)
Diamond	XL	4 quarterly planning sessions 2 Strategic Workshops or equivalent services* 4 Technical Workshops 2 Platform 360 server evaluations - Access to Assist (based on your organization)**	125K+	75K+	250,000 +
Platinum	L	4 quarterly planning sessions 1 Strategic Workshops or equivalent services* 4 Technical Workshops 2 Platform 360 server evaluations - Access to Assist (Suitable for groups of ~30 users)**	80K	50K	100K - 250K
Gold	M	4 quarterly planning sessions 4 Technical Workshops 2 Platform 360 server evaluations - Access to Assist (suitable for groups of ~15 users)**	50K	35K	50K - 100K
Silver	S	2 planning sessions (on-demand) 2 Technical Workshops (public) 1 Platform 360 server evaluation - Access to Assist (suitable for groups of ~5 users)**	40K	20K	25K - 50K
Bronze	XS	2 planning sessions (on-demand) 2 Technical Workshops (public) - Access to Assist (suitable for groups of 1-3 users)**	N/A	N/A	10K - 25K

* Services can be flexible but must be approved after a scoping call

** Suggested number of users for Assist are for Fair Use Policy

Strategic Vision and Roadmapping

Focused, strategic consultancy to define a path to analytics success

Overview

Understanding what specific, actionable tasks are required to fulfil transformative, organization-wide ambitions is a challenge. Our unique blend of real-world technical expertise and strategic experience means we can help you define gaps, goals, strategic themes and recommendations to help you on your way to analytics success.

What to expect

The output of an SVR is a comprehensive assessment and recommendations document that includes a path to reach the desired vision. We conduct multiple workshops and / or 1:1 interviews with teams that are responsible for different aspects of analytics such as commercial teams, those responsible for content creation, interpretation and consumption, managing data pipelines, or running the COE. The deliverables are created based on the findings from the workshops.

Example milestones

- Identify opportunities for data to create business value
- Capture timelines for major milestones, outcomes, and targets
- Explore existing pain points and challenges in leveraging data
- Map ownership and contributions of internal groups
- Review architecture, administration, health, capacity, licensing, and performance
- Review analytics organization structure, Centre of Excellence capabilities, and impact on vision
- Define roles and responsibilities for technology and business users
- Refine education and enablement strategy for developers and consumers
- Define long-term support strategy; toolsets, processes, and staffing
- Capacity planning: anticipating future adoption and demand

Strategic workshops

A range of structured workshops addressing data strategy, platforms, people and learning

Overview

Evaluate current state, define future vision, and create a comprehensive roadmap for success. Through customized workshops, we'll identify key issues, facilitate discussion, define realistic outcomes and provide concrete recommendations for next steps.

What to expect

Strategic workshops can be customised for *your* requirements. Typically delivered over a several days, we'll conduct a review exercise to gather information about tooling, people, processes and systems.

This will then drive the delivery of group-based workshops where we'll dive into the detail to map current state against future requirements, leverage out

Workshop options

- **Vison and Roadmapping** to define ways to align efforts and create business value from data and align.
- **Data Strategy** to define best practice for architecture, administration, capacity and performance.
- **Platform Evaluation** to define best practice for infrastructure and management.
- **Process and COE** to review organisational structure, centre of excellent strategy and capabilities

Dependencies and considerations

- Collaborative alignment with major stakeholders to define and assess approach

Governance 360

Targeted recommendations, best practices, and an actionable roadmap to improve self-service in Tableau

Overview

Governance 360 is a qualitative assessment of a client's Governance processes for Tableau Server and Tableau Cloud. The assessment occurs over a series of interviews with the client, where the consultant then takes the information gathered to propose recommendations. The total effort for this engagement should not exceed 40 billable hours.

What to expect

Many clients have grown their Tableau environments quickly to meet the demands of their many users. However, over time, without proper consideration for governance, these environments can get out of hand and no longer be scalable with the business. Governance360 is where InterWorks can intervene to help assess the current environment and make clear recommendations on processes, policies and roles to foster a better experience for all users.

Example milestones

- Discuss broad governance approach, identify business objectives, and define goals for Self-Service Analytics
- Conduct governance interviews with client stakeholders
- Inventory current resources and policies for Tableau Server/Tableau Cloud
- Create and provide governance assessment review and recommendations

Dependencies and considerations

- Access to client's Tableau Server/Tableau Cloud environment
- Access to client stakeholders with knowledge of the Tableau Server/Tableau Cloud environment

Platform 360

The comprehensive, deep-dive audit of performance, usage, engagement and configuration data

Overview

Understand how to extract the best performance from your Tableau environment, optimise the end-user experience and focus content development efforts where they're most needed with a Platform360. We collect detailed data from Tableau and the underlying operating system to create a suite of dashboards and narrative-driven reporting tailored to your requirements. We'll then play this back in a workshop led by one of our Platform Architects to plan out the changes required to extract the maximum value from your Tableau investment.

What to expect

With the 360-degree assessment, the InterWorks team gathers hardware usage and application data over a two-week period and then makes recommendations regarding optimization, scaling for growth and best practices.

Example milestones

- Verification of hardware, environment, and configuration suitability
- Map extract schedules and backgrounder patterns to peak efficiency
- Audit clean-up, backups, disaster recovery, and business continuity strategy
- Monitor, log, and analyze hardware usage statistics for bottlenecks and errors
- Analyze workbook and data source utilization
- Support identification and remediation of performance issues
- Document recommendations for hardware and software environment

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Pre-engagement call and collection of 1-2 weeks of system logs

Dashboard Performance 360

The comprehensive, deep-dive audit of dashboarding content

Overview

Review existing Tableau content and provide recommendations to developers on how to improve performance and maintainability of their dashboards. A Dashboard Performance 360 not only helps developers solve current problems with the content reviewed but helps teach them best practices and patterns of development to enable them to improve future content.

What to expect

Many of our clients have dashboards that are quickly put together to solve a quick need with little thought to things like performance, governance, or longevity. What happens when these quick dashboards become staple reports that need to be performant? Through a Dashboard Performance 360 engagement, we can pinpoint issues that need to be addressed as well as document solutions to these issues. Based on these findings, your content developers will be trained to understand which changes would be most impactful in the reports that are reviewed..

Example milestones

- Identify workbooks to be reviewed
- Benchmark current-state performance characteristics
- Audit and document data structures and contributing calculations
- Analyze and document performance impacting factors
- Recommend data source, calculation, worksheet, and dashboard improvements
- Transfer knowledge, documentation, and approach of best practices

Dependencies and considerations

- Access to necessary data feeds, toolsets, and databases
- Availability of business representatives for clarification and handoff
- Access to Tableau environments

Pulse Readiness Assessment

Get your data ready for generative AI

Overview

InterWorks' Tableau Pulse Readiness Assessment combines our expertise in all things Tableau, with data-driven insights about the state and AI-compatibility of your Tableau Cloud Site and data. Our Solution Architects will work with you to identify Tableau Pulse Use Cases and create a roadmap for Pulse adoption.

What to expect

Teams who participate in a Tableau Pulse Readiness Assessment can expect to walk away with a data-driven assessment on their data's compatibility with Tableau AI, identification and ranking of potential use-cases, a clear understanding which use-cases will most effectively meet stakeholder needs, along with recommendations for Tableau Pulse implementation and adoption.

We'll then walk you through our recommendations to show how you can bring Tableau Pulse to life at your organization.

Example milestones

- Connect to and analyze metadata from your Tableau Cloud Site through the lens of compatibility with Tableau's AI
- Review user-behaviors and interview key-stakeholders and business users to identify and rank potential Tableau Pulse Use Cases and key metrics for you to consider.
- Provide a detailed roadmap for user adoption and integration into end-users' workflows

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Pre-engagement call and collection of 1-2 weeks of system logs

Pulse Quick Start

Bring generative AI insights to your business users faster

Overview

Building on the foundation of the Tableau Pulse Readiness Assessment, our Solution and Data Architects will work with you to define Tableau AI-compatible KPI metrics and construct the required Tableau Cloud semantic layer needed to implement your first Tableau Pulse Use Case. We'll make sure everything is running smoothly end-to-end and provide training to stakeholders and end-users to ensure they are fully taking advantage of this new feature at your organization.

What to expect

- Complete integration of initial Tableau Pulse use-case
- Clearly defined business KPIs for use with Tableau Pulse
- Fully constructed Tableau data source to serve as the semantic layer for Tableau AI
- Training and documentation for key stakeholders and business users
- Detailed roadmap for future Tableau Pulse Use Case integration

Example milestones

- Define metrics for KPIs
- Semantic layer data modelling and implementation
- Pulse configuration, testing and validation
- User training and feedback

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Pre-engagement call and collection of 1-2 weeks of system logs

Self-Service 360

Targeted assessment of your Tableau Server environment to plan ThoughtSpot migration strategy

Overview

As part of our suite of Tableau Server assessments, a Self-Service 360 is strategic assessment specifically designed to determine an appropriate strategy for the migration of content and analytics use-cases to ThoughtSpot.

Using sophisticated data-driven analysis of your Tableau Server environment, we'll determine what content can be migrated to ThoughtSpot, what use-cases can be re-factored for ThoughtSpot search and highlight specific areas where ThoughtSpot will provide a more effective self-service tool for your users.

What to expect

We'll collect data from the Tableau Server repository alongside data about the workbooks, data sources and calculations from the metadata API. We'll then integrate and transform the data to provide actionable insights to kick-start you on your path to ThoughtSpot.

Example milestones

- Establish access to the Tableau Server repository and metadata API
- Analyze workbook and data source utilization
- Analyze calculation complexity and dependencies
- Analyze usage patterns and user behaviour
- Document recommendations for content migration potential, re-factoring use-cases and further investigation

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Pre-engagement call and collection of 1-2 weeks of system logs

Snowflake Health Check

Review your Snowflake environment to identify security, architecture and cost inefficiencies

Overview

A Snowflake Health Check is a comprehensive review of your existing snowflake instance conducted by certified experts. During the engagement, our team will identify areas where best practices could be implemented, identify and quantify cost-saving opportunities, and ensure you're adhering to current security protocols.

A Snowflake Health Check is a great fit if you're struggling to manage costs, experiencing poor query performance or simply focused on matching compute needs with appropriate warehouse architecture.

What to expect

We'll conduct a kick-off call with stakeholders to identify specific areas of concern, run a suite of queries against your Snowflake environment, collate results, and playback documented findings and recommendations to your team for immediate implementation.

Example milestones

- Warehouse usage and cost analysis recommendations
- Best practice gap analysis and review / recommendations
- Environment performance report
- Access control vulnerability recommendations
- Hand-off session with client to playback recommendations

Dependencies and considerations

- Kick-off call with Snowflake environment owner
- Access to technology personnel and business stakeholders
- Access to Snowflake environment to run queries

Self-Service data readiness assessment

Identify issues that are getting in the way of effective self-service business intelligence

Overview

Self service projects very often fail to deliver the expected benefits. This can be because the data made available to end users is ambiguous, inaccurate or in a form where it's difficult to extract value.

A data readiness assessment will allow you to identify the steps they need to take to implement a self-service analytics solution that will gain traction with end users, allow them to uncover useful insights and make better evidence-based decisions.

What to expect

Two different surveys will be sent electronically to data providers and data consumers within your organization. These surveys comprise ~20 quantitative questions each and are designed specifically to assess discovery, function management, monitoring, governance and compliance within your environment.

Example milestones

- Documented key findings and current state
- Documented objectives and future state
- Documented roadmap and action Items to get to the final goal: a dataset that is ready for self-service analytics

Dependencies and considerations

- Access to and confirmation of targeted participants:
 - **Data Providers** (BI technical managers, Data Analysts, Data Engineers and Data Owners)
 - **Data Consumers** (business users who would use the data to inform business decisions)

Solution Design Sprint

Tap into our expertise in design thinking and human-centered solution design

Overview

A Solution Design Sprint is a phased approach to facilitated creative thinking that applies the philosophy and tools of design thinking to data analytics and the development of business data products. Teams who engage in a Solution Design Sprint can expect to walk away with clarity around end-user requirements and analytic questions as well as an actionable roadmap for data-suite development.

What to expect

Solution Design Sprints take place over the course of several days. During this time, client participants will be guided through discussions and activities to produce a solution idea to their problem statement. A summary will be provided at the completion of the engagement detailing the outcomes of all exercises and well as documenting all ideas and prioritizations discussed during the sprint.

Example milestones

- Conduct meetings with stakeholders to establish purpose & design constraints
- Coordinate workshop dates/times, provide preparation material to participants once identified and conduct workshops
- Design and propose resultant solution, organize and document findings following each workshop
- Build wireframes, sitemaps, and architecture diagrams as necessary to support proposed solution design
- Summarize and document key insights following sprint completion

Dependencies and considerations

- Project manager coordination of schedules and availability
- Participation of key stakeholders in interactive workshops

Custom Data Solution

Find your path from problem to completely managed solution

Overview

A Custom Data Solution is our process for delivering a fully managed solution to a specific challenge or data problem. This is the ideal solution when you have run into the limits of your current tooling, are running into budget constraints with large platform tools, or have unique requirements that go beyond your current tool capabilities.

What to expect

Custom Data Solution projects happen across three main phases. In most cases, we start with our Solution Design Sprint to identify the key problem and potential solutions. Next, we rapidly prototype solutions in our InterWorks Prototyping Infrastructure to test and validate the proposed solution with your team. Finally, we move to a production build and deployment, giving you a solution that is fully managed by our KeepWatch teams, maintained by our developers, and includes user support, allowing you to focus on your business and not maintaining the solution.

Example milestones

- Conduct meetings with stakeholders to establish purpose & design constraints
- Design and propose resultant solution, organize and document findings following each workshop
- Build wireframes, sitemaps, and architecture diagrams as necessary to support proposed solution design
- Prototype and test based on defined budget
- Define production acceptance criteria with stakeholders
- Final Production development and deployment
- Final review and acceptance

Dependencies and considerations

- Project manager coordination of schedules and availability
- Participation of key stakeholders in interactive workshops

Targeted Dashboard Development

Entrust development of specific dashboards to one of our experts

Overview

Do you have a high visibility dashboard to build that needs to impress users? Or an existing dashboard that needs to be reimagined because it isn't getting the traction it should? We'll work with your team to build the best user experience, optimizing for performance, usability, sustainability, and impact.

What to expect

Dashboards are the right solution when clients have clearly defined, repeatable questions they want to answer with data. We work iteratively with our clients throughout the entire process, but we'll intentionally transfer ownership towards the end of the project so your team can confidently manage the final dashboard(s).

We'll explore your data, understand your users' needs and work with your teams to define, develop and deliver production-ready dashboard(s) for testing.

Example milestones

- User and stakeholder interviews
- Lo-fi wireframing
- Iterative development involving a small group of stakeholders (5 or fewer)
- Logic definition in Tableau (or recommendations to push logic into the data layer)
- User testing and data validation (if desired and time permits)
- In-workbook documentation and knowledge transfer

Dependencies and considerations

- Access to necessary data and platforms
- Availability of stakeholders and end users to explain user behaviours and metrics
- Access to Tableau development, publishing, and consumption environments

Data Modelling & Preparation for Tableau

Wide data? Tall data? Big data? No problem. We'll help get your data fast and ready for high performance dashboarding

Milestones

- Capture business requirements and KPI definitions
- Define and document best-case data model
- Leverage best practices for WDC, live, and extracted connections
- Incorporate row, column, and data source-level permissions
- ETL and/or SQL data engineering to produce reporting dataset
- Integrate with established governance process
- Iterative development alongside dashboard developers/content creators
- Roadmap data refresh automation and sustainability
- Implement QA process to ensure accuracy and high quality
- Knowledge transfer, audit, and documentation

Dependencies

- Access to necessary data feeds, toolsets and databases
- Availability of business representatives for KPI identification, definition and QA
- Format and integration information for existing meta-data management system

Dashboard UI + UX

Go beyond defaults and get away from basic data visualization

Overview

Make your dashboards more effective and trustworthy through great design. By centering your users and creating effective and familiar dashboards, you'll see greater impact on your business and users will thank you. We create consistencies throughout your reporting, and build effective design systems that are repeatable, and consistently prioritize the right metrics at the right moments.

What to expect

First, we'll develop the blueprint together by refining the purpose and audience of the solution, building out sitemaps, and creating wireframes. Next, we tackle the details and graphics of the user interface, applying the polish on top of our well-designed foundation. We'll establish the exact colors to indicate specific findings, the size of elements, so they are understood hierarchically amongst a sea of data, and the fun touches of personality that circle data back to your organization.

Example milestones

- Low-fidelity mockups and wireframes in our whiteboarding tool
- Link to FigJam file for collaboration
- Polished mockups of final dashboard for the screens agreed upon by client
- Clickable prototype for client to keep; this can be shared internally so client teams can discuss and agree upon design before beginning production in the required data visualization tool

Dependencies and considerations

- Access to necessary data and platforms
- Availability of stakeholders and end users to explain user behaviours and metrics

Dedicated Dashboard Expertise

Amplify and accelerate your Tableau development capabilities

Overview

Do you have a high visibility dashboard to build that needs to impress users? Or an existing dashboard that needs to be reimagined because it isn't getting the traction it should? We'll work with you to determine where we can support you to maximize our impact.

What to expect

We'll augment your development capabilities on a month-to-month basis, providing dedicated and consistent hands-on support for longer periods, spanning net-new development as well as iterative improvements to existing dashboards.

We'll explore your data, understand your users' needs and work with your teams to define, develop and deliver production-ready dashboard(s) for testing.

Example milestones

- User and stakeholder interviews
- Lo-fi wireframing
- Iterative development involving a small group of stakeholders (5 or fewer)
- Logic definition in Tableau (or recommendations to push logic into the data layer)
- User testing and data validation (if desired and time permits)
- In-workbook documentation and knowledge transfer

Dependencies and considerations

- Access to necessary data and platforms
- Availability of stakeholders and end users to explain user behaviours and metrics
- Access to Tableau development, publishing, and consumption environments

Dashboard Productionalization

Use our experience to elevate your content

Overview

Over time the iterative nature of dashboard development and updates can result in overly complex objects that can be difficult to maintain and slower to load than we would like. Dashboards - when done well - become key decision-making tools that are worth polishing to make sure they are stable and performant.

We'll productionalize your dashboard to not only perform well but be easier to maintain and grow with your business

What to expect

Dashboard Productionalization is a solution designed to take these dashboards (and others like them) and get the production ready, in order to bring trust and performance to our clients most important report. Through our Dashboard Productionalization process we identify the main drivers of load time, optimize the dashboards to be more performant, clean up the technical debt leftover from the development process, and apply development best practices.

Example milestones

- Benchmark current-state performance characteristics of Tableau dashboards
- Analyze and document performance impacting factors
- Audit data structures and contributing calculations
- Recommend and or implement data source improvements
- Optimize calculations, worksheets, and dashboards
- Document performance gains, processes, and techniques applied
- Transfer knowledge, documentation, and approach of best practices

Dependencies and considerations

- Access to necessary data feeds, toolsets, and databases
- Availability of business representatives for clarification and handoff
- Access to Tableau environments

Tableau Server Rapid Start

Tableau Server installation and configuration following Tableau best practices

Overview

Did you just invest in a shiny new Tableau Server environment but don't know where to start to get it installed and configured? No worries! Let our team of experts help get you setup with a Tableau Rapid Start.

What to expect

After a thorough planning session, we'll get Tableau Server installed and configured following Tableau best practices. We'll show you how to backup and restore Tableau Server. We'll strategize with you on best practices for data management. We'll even make sure you're successful publishing your first workbooks to Tableau Server. And when we leave, you'll have detailed environment documentation, so you know what we did.

Example milestones

- Capture Business and IT requirements for Tableau Server environment
- Define optimal server hardware sizing, licensing and configuration
- Define backup and recovery procedures and off-cluster requirements
- Define upgrade cadence, strategy, procedure, and testing protocol
- Install and configure Tableau Server
- Configure and schedule clean-up and backup scripts
- Integrate additional third-party tools as necessary
- Document deployment, discovery, and execution for each milestone

Dependencies and considerations

- Access to technology personnel to assess existing environment
- Access to documentation for DR/HA requirements, constraints, and resources
- Access to business stakeholders to optimize development and consumption
- Server nodes created and running appropriate operating system/specifications

Power BI Report Development

Entrust development of a specific report to one of our experts

Overview

Do you have a high visibility report to build that needs to impress users? Or an existing dashboard that needs to be reimagined because it isn't getting the traction it should? Instead of overloading your team while they juggle other priorities, we have a way to amplify your Power BI development capabilities.

What to expect

Dashboards are the right solution when clients have clearly defined, repeatable questions they want to answer with data. We'll work with your teams and stakeholders to build or re-imagine dashboarding content using best-practice methodology. The expected outcome for Power BI Report Development is an accurate and fully functioning dashboard, with supporting knowledge transfer documentation explaining calculation logic and development narrative.

Example milestones

- User interviews
- Lo-fi wireframing
- Iterative development involving a small group of stakeholders
- Logic definition in Power BI (or recommendations for the data layer)
- Data validation
- In-workbook documentation and knowledge transfer sessions

Dependencies and considerations

- Key stakeholders identified and available throughout development
- Full data or reasonable sample compiled
- Data dictionary or time available from data steward to explain the source
- Permissions and licenses for required tech (Power BI, Power BI Premium, databases, VPN or virtual desktop, client laptop, etc.)

TCM: Migration Assessment

Determine feasibility and develop a roadmap to migrate from Tableau Server to Tableau Cloud

Overview

Tableau Cloud provides compelling benefits for organizations of all sizes. It's a fully-managed SaaS product with very light administrative requirements, has a 99.9% uptime SLA, and for organizations with cloud-ready architecture it can provide tangible time and money savings in comparison to Tableau Server. However, migrations are often multi-faceted and complex. We can help.

What to expect

InterWorks prioritizes a deliberate strategy for migration success. Our Migration Services are delivered by experts who ensure your approach to migration is as unique as your organization.

Following a free **advisory session**, we'll undertake a data-driven assessment of your Tableau Server environment, conduct sessions to discuss right-sizing your new Tableau Cloud environment, and create a comprehensive Master Plan that lays the foundation for an informed, strategic migration.

Example milestones

- Assess current infrastructure and configuration of Tableau environment for migration to Tableau Cloud, including licensing and authentication analysis
- Analyze Tableau Server repositories for content-level complexities/blockers, including on-premises data sources, embedded data sources, and components requiring manual migration
- Advise on Tableau Cloud data strategy with evaluation and recommendations for Tableau Bridge where applicable

Dependencies and considerations

- InterWorks **TCM Advisory Session** completed
- **Platform360** data collection for all source environments/nodes
- Scheduling availability of and attendance by necessary Server/Site Administrators for Strategic Advisory call

TCM: Implementation

Migrate from Tableau Server to Tableau Cloud using a customised Master Plan

Overview

Tableau Cloud provides compelling benefits for organizations of all sizes. It's a fully-managed SaaS product with very light administrative requirements, has a 99.9% uptime SLA, and for organizations with cloud-ready architecture it can provide tangible time and money savings in comparison to Tableau Server. However, migrations are often multi-faceted and complex. We can help.

What to expect

InterWorks prioritizes a deliberate strategy for migration success. Our Migration Services are delivered by experts who ensure your approach to migration is as unique as your organization.

Once we've developed your **Migration Plan**, our dedicated Platform Architects will resolve blockers and execute content migration from Tableau Server to Tableau Cloud – taking you all the way to deployment and testing of your new environment.

Example milestones

- Activation, design and implementation of the new Tableau Cloud environment
- Content migration and refactoring for workbooks with on-prem data sources
- Automated content migration for Cloud-connected workbooks
- Scripted migration of subscriptions and custom views
- Implement compatible licensing in the new environment
- Handoff to and continued support by KeepWatch team for one year

Dependencies and considerations

- InterWorks **TCM Migration Plan** completed
- Access to REST and Metadata APIs in the legacy environment
- Access to technical SMEs

Snowflake rapid start

Best practice configuration of Snowflake storage, compute and user settings

Overview

Deploy a new Snowflake environment leveraging InterWorks' best practices to shorten migration time, maximize performance and improve adoption. Our team will ensure that you are set up for success, allowing you to fully harness the capabilities of Snowflake as a class-leading data platform.

What to expect

Many of our clients begin their Snowflake journey keen to deploy as quickly as possible, moving rapidly through key steps before fully understanding the platform capabilities. As demand increases, this foundation can begin to struggle, with each new addition to the platform potentially leading to more overhead and compounding underlying risks.

During a Snowflake Rapid Start engagement, we'll work with key stakeholders to deploy a foundation that can scale to increased usage whilst reducing operational overhead.

Example milestones

- Initial discussion to understand the current and future expectations
- Tailor-made data and security architecture based on a selection from our carousel of battle-tested data platform architectures
- Accompanying documentation and artifacts
- Preliminary configuration of storage, compute and user settings
- Concluding workshop explaining the setup, the recommended usage and future expansion

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Access to necessary data feeds, toolsets, and databases

Matillion rapid start

Shorten migration times, onboard users quickly, and get the most from your new Matillion deployment

Overview

We'll create and deploy a durable Matillion environment to fully maximise the value of the tool. The Matillion Rapid Start from InterWorks will allow you to get the most from your new Matillion deployment. Shorten migration time, onboard users quickly, maximize performance, and create value rapidly.

What to expect

We'll deploy your Matillion environment(s) to support modern DevOps approaches and reliable data pipelines. We'll provide you with a fully architected and recommended project infrastructure tailored to your current and future needs, deployed inside your environment whilst aligning with your infrastructure team to get the most out of your setup.

Example milestones

- Initial discussions to understand their current and future expectations from their data platform
- Best effort preliminary deployment and configuration of Matillion infrastructure
- Enablement sessions to support developers as they adopt this new technology
- Accompanied documentation
- Optional authentication, network and integration settings, depending upon client's requirements and readiness
- A concluding workshop explaining the setup, the recommended usage and future expansion

Dependencies and considerations

- Access to technology personnel and business stakeholders
- Access to necessary data feeds, toolsets, and databases

Analytics Sprints

Solve analytics challenges and fulfil defined objectives

Overview

Analytics Sprints are an effective way of fulfilling specific, defined objectives during an iteration of work. Whether the sprint focuses on development, data preparation, UI / UX or performance tuning, the objectives are tightly aligned with demonstrable value that the organisation can use to support onward development.

What to expect

Data sprints are typically delivered by Analytics Consultants or Analytics Architects, who will work in your environment, on your data.

Typically, a Sprint is focused on a specific component of your analytics function and can involve end-to-end dashboard development, refinement of existing data sources to build semantics layers for BI tools, user experience improvements, performance tuning audits and advisory support for your team.

Example milestones

- Identify opportunities for data to create business value and translate into actionable outcomes for each sprint.
- Explore existing pain points and challenges in leveraging data
- Map ownership and contributions of internal groups
- Inventory analytics systems and user consumption patterns
- Review tool selection, architecture, health, capacity, and performance
- Structure platform management, administration, governance, and monitoring
- Define roles and responsibilities for technology and business users

Dependencies and considerations

- Access to necessary data feeds, toolsets, and databases
- Availability of business representatives for spring duration planning, workshops and 1:1 interviews

Data Sprints

Solve data architecture and engineering challenges and fulfil defined objectives

Overview

Data Sprints are an effective way of fulfilling specific, defined objectives during an iteration of work. Whether the sprint focuses on ingestion, loading, orchestration or transformation, the objectives are tightly aligned with demonstrable value that the organisation can use to support onward development.

What to expect

Data sprints are typically delivered by Data Engineers or Data Architects, who will work in your environment, on your data.

Typically, a Sprint is focused on a specific component of your data pipeline and can involve orchestration (consolidation of data from different sources), ingestion (importing varied data into a CDW or related storage layer), transformation (cleansing, and structuring data into an appropriate format) and semantic layer creation (providing a consistent, discoverable and unified data for analytics).

Example milestones

- Identify opportunities for data to create business value
- Explore existing pain points and challenges in leveraging data
- Map ownership and contributions of internal groups
- Inventory data systems, sources and ETL / ELT patterns
- Establish security and governance baseline for analytics access
- Review tool selection, architecture, health, capacity, and performance
- Structure platform management, administration, governance, and monitoring
- Define roles and responsibilities for technology and business users

Dependencies and considerations

- Access to necessary data feeds, toolsets, and databases
- Availability of business representatives for spring duration planning, workshops and 1:1 interviews

Data Activations and Integrations

Send data from your analytics stack to external systems and tools

Overview

To fully unlock the data in your data warehouses and dashboards, your analytics stack need to be connected to your organization's wider ecosystem and discrete applications. InterWorks has partnered with leading industry tools **Hightouch** and **Tray.io** to deliver writeback, activation and integration solutions - automating workflows and actions on your way to deliver data-driven outcomes.

What to expect

We'll deliver a solution catered to your specific needs as an organization. It begins with working with your team to define requirements on how data can be leveraged and how different systems can be connected. An architectural plan will then be created based on best practices and testing, then the solution will be implemented in your environment. At the end, you can expect a fully automated solution with supporting knowledge transfer and documentation.

Example milestones

- User interviews
- Identify opportunities for data to create business value
- Explore existing pain points and challenges in leveraging data
- Iterative development involving a small group of stakeholders
- Data validation and testing

Dependencies and considerations

- Access to necessary data feeds, toolsets, and databases
- Availability of business representatives for clarification and handoff
- Data dictionary or time available from data steward to explain the source

Curator

Seamlessly integrate your analytics into one platform for a better, unified experience

Overview

Curator is the website builder for analytics and analysts that our clients have used to increase user adoption by as much as 350%. Curator lets you quickly build company intranets, analytics portals, and data products. With our tools, you'll gain control over your data governance process and increase user adoption.

Easily white-label Tableau, ThoughtSpot, or Power BI to deliver a branded experience to your users. You can further customize the experience to target the specific needs of your executives, employees, vendors, and customers.

Redesign your data experience

Curator exists to elevate your dashboards, helping your audience connect with them. By using the embedded analytic capabilities of Tableau, Power BI, and ThoughtSpot with the power of Curator, you can increase user adoption, improve onboarding and deliver truly impactful analytics.

PRODUCT PLAN

Features

- Easy page-building and styling with no-code tools
- Unlimited users*
- Multiple analytic integrations - Tableau, ThoughtSpot, or Power BI
- Group-specific homepages
- Group-specific styles
- Form manager
- Org chart
- Development tools (APIs and Integration Manager)

Support: Local business hours support

Hosting: SaaS or Self-Hosted (free)

Pricing: Starts at \$20,000 per year

Enterprise options (POA)

- Enterprise SaaS Available
- Self-Hosted Enterprise Support via **KeepWatch**
- High Availability and Multiple Servers
- Self-Service Department Deployment

KeepWatch for Curator

We'll take care of the tech; you focus on the business

Overview

We created KeepWatch for clients who need infrastructure support paired with a consultative approach. KeepWatch is expert-driven, anchored by SLA guarantees, and comes with tools included.

At InterWorks, KeepWatch is powered by many different teams - systems engineers working on global rotations, consultants and architects providing incisive guidance on the long-term health of the supported products, and engagement specialists who are checking in with the customer periodically to make sure everything is on track.

When you are a KeepWatch customer, you've hired an entire practice to fill a role in your organization for a fraction of the cost of an FTE.

UPGRADED SUPPORT FOR ENTERPRISE

The KeepWatch team at InterWorks works with your analytics infrastructure team to support the day-to-day operations of your Enterprise Curator.

- Global Priority Queue
- Curator Monitoring and Performance Optimization
- Curator Backup and Disaster Recovery
- Curator Upgrades and Patching
- Curator Consulting and Strategy
- Curator Backend User Support

Pricing: Starting at **\$20,000** per year

BI tool training

Learn the skills in the tools that your organization has adopted

Overview

Is your team adopting a new BI Tool? Do you have an experienced team but want to implement Best Practices within your organization? Maybe you have noticed inaccuracies, gaps in your analytics, performance issues, or just want to have a cohesive look to your analytics products? We are here to help!

We will bring our expertise and curiosity to your organization and help you learn the tools you need to master, while keeping your business questions and use cases as the focus.

What to expect

We offer a wide variety of training options, from full day onsite trainings, to 2hr workshops. We can deliver our trainings onsite or virtually. Tell us your goals and we will help you get there!

Example milestones

- Expert trainers to help you learn in a fun and friendly environment
- Business relevant examples and demos to help you apply what you learn to your real-world projects
- Resources and handouts for after the training to support your ongoing learning

Dependencies and considerations

- Access and appropriate licensing for participants in the respective tool

Data Literacy workshops

Build a culture where data literacy has real impact on decisions and outcomes

Overview

Creators, consumers, analytical tools – all these components are vital to building a culture where data literacy impacts decisions and outcomes. The goal of this workshop is to establish a common language and demystify data, charts, and types of analysis. We'll walk through how the types of questions you have impact not only the charts you need to see, but the data that needs to be collected to build those charts. Novice to experienced users/builders of visualizations will benefit from the discussions and activities throughout this workshop.

What to expect

No software are needed for the course. Class participants will be broken up into teams and given sample data set to use during exercises. Break-out exercises rely on using whiteboards/large paper pads and markers to draw out charts and dashboards.

Prerequisites

- Familiarity with Tableau, or similar visualization software, is encouraged
- Workshop is tool agnostic, and no software (other than virtual delivery platform) is required
- For virtual workshops, each attendee should have paper and writing utensils for activities
- For on-site workshops, whiteboards/flip charts, markers for activities
- Can be customized with client's own data/use cases

Dependencies and considerations

- Collaborative alignment with major stakeholders to define and assess approach

Technical workshops

A range of structured workshops addressing specific analytics roles and use-cases

Overview

Our technical workshops are public or privately-run sessions focusing on specific technical areas or use-cases where we know organisations sometimes need a little help. We know that great solutions take a combination of skillsets – which is why we developed a training program that can target the various analytic roles in the organization.

What to expect

Workshops are usually around one hour long with a Q+A session and are available by registration. Upcoming workshops are publicised in advance to ensure the right stakeholders can attend. If required, workshops can be delivered privately.

Workshop options

Our catalogue of available workshops is constantly evolving, and we're happy to consult to develop custom workshops.

A few examples include:

- 10 Tableau things you forgot
- Changing Crosstab Culture
- Designing for Data 1 + 2
- Governance Essentials
- Tableau Prep Essentials
- Tableau Desktop Essentials 1, 2 + 3
- Visual Analytics Essentials
- Tableau Workbook Optimisation
- Data Prep in Tableau Desktop
- Row Level Security in Tableau
- Tableau Essentials for Consumers
- The Tableau Performance Recorder
- Tableau Bridge Foundations
- Tableau Cloud Migration
- ThoughtSpot Essentials
- ThoughtSpot Data Management
- ThoughtSpot Advanced

Custom course development

Create a customized analytics course that best meets the needs of your organization

Overview

Our mission is to foster a culture of learning within organizations, tactically and strategically, that drives analytics independence and sustainable insights.

We'll use our expertise in data and analytics, couple it with the latest and greatest tool features, topics, and best practices, and create tailor-made custom courses aligned with your organisation's goals. If you're looking to upskill your analytics community and you know where the weak points are, custom course development is what you need.

What to expect

We'll identify key enablement and training issues, facilitate discussion, define realistic outcomes, collate representative / sample data and provide learning materials and in-person training sessions with defined outcomes.

Example milestones

- Define and distribute enduring materials for self-guided learning
- Create business-relevant training manuals and materials to supplement learning
- Leverage sample data and specific use cases to target desired learning experience
- Deliver customized seminar content and training session agenda
- Integrate custom course materials and delivery into existing curriculum
- Targeted training outcomes with content tailored towards existing knowledge gaps

Dependencies and considerations

- Collaborative alignment with major stakeholders to define and assess approach

1 on 1 Coaching/ Office Hours

Get 1 on 1 coaching and learn while you smash your project goals

Overview

Are you a team of one? A lone ranger in the wild west of data and analytics at your organization? Or do you just need a more personalized learning approach for that really important project you have to do? We are here to help!

Let our experts help you learn the specific techniques, tools, and features you need, as you need them. We can tailor your learning to the topics and use cases that you bring to your coaching sessions. This is the most fun and effective when you have a project that you need to complete, and we use that as the learning experience. We love a challenge!

What to expect

We will identify the areas you want to learn and craft a learning experience that fits your needs. We will meet with you virtually and guide you through not only how to accomplish your task, but also any foundational and conceptual knowledge that you need, so you can transfer your learning to the next project that comes up.

Example milestones

- Define areas of need
- 1:1 coaching sessions to problem solve and learn how to approach the problem with best practices in mind
- Successful completion of the defined goals and outcomes
- Resources and handouts to help you remember what you learned, as you move forward

Dependencies and considerations

- Collaboration and planning sync to explore project goals, learning outcomes, and expectations
- Access and tool licensing appropriate to the coaching needs

Client Tableau User Group

Building and keeping an analytics community active is your goal. Forming your own Tableau User Group with regularly scheduled sessions will empower your internal champions and grow your community from the ground up

Milestones

- Provide a space for Tableau users to share their current work
- Collaborate on challenges specific to client
- Identify style guidelines and principles
- Grow Tableau champions
- Expand Tableau user footprint

Dependencies and considerations

- Monthly schedule for meetings
- Meeting space
- Speakers/ presenters from the Tableau community

Support & Documentation

A little something to remember us by

Overview

As our time together comes to an end (at least for now), we want to leave you with something to remember us by. Our team will gather resources and documentation on the work we have done, so that you and your team don't have to sweat. As part of our wrap-up, we will provide hand-off training to your team, so you can pick up with the maintenance of the project that we just completed.

What to expect

We will provide documentation on our processes, development, and any use case specific tips and tricks to set your team up for success. We will also provide a hand-off training, in which we will demonstrate the deliverables and answer questions your team may have.

Example milestones

- Resources and handouts specific to the project and goals
- Technical documentation of the completed project
- Hand-off training specific to the completed project

Dependencies and considerations

- Collaboration and planning sync to explore goals and expectations

KeepWatch for Tableau Server

We'll manage your analytics platform, so you don't have to

Overview

We created KeepWatch for clients who need infrastructure support paired with a consultative approach. KeepWatch is expert-driven, anchored by SLA guarantees, and comes with tools included.

At InterWorks, KeepWatch is powered by many different teams - systems engineers working on global rotations, consultants and architects providing incisive guidance on the long-term health of the supported products, and engagement specialists who are checking in with the customer periodically to make sure everything is on track. When you are a KeepWatch customer, you've hired an entire practice to fill a role in your organization for a fraction of the cost of an FTE.

KeepWatch for Tableau Server monitors the health and performance of your BI platforms and supports you in hosting; analyzing and applying insights; and charting a course for the future of your data practice.

PRODUCT PLAN

- Agent-based 24/7 Server monitoring
- Guaranteed response times for OS and application availability issues
- Server architecture and design consultation
- Usage and adoption monitoring and consultation
- Server governance and datacenter consultation
- Initial on-boarding health assessment
- Monthly server health checks
- Monthly scheduled maintenance window, including operating system updates and patches
- Quarterly scheduled maintenance window
- Biannual server assessments and recommendation
- Major server version upgrade planning and assistance
- Deployment support offered for both on-prem datacenters and cloud platforms (e.g., AWS, Azure, Google Cloud or client preferred platform)

KeepWatch for Tableau Cloud

We'll manage your analytics platform so you don't have to

Overview

We created KeepWatch for clients who need infrastructure support paired with a consultative approach. KeepWatch is expert-driven, anchored by SLA guarantees, and comes with tools included.

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KeepWatch for Tableau Cloud takes that philosophy above and applies it to the lifecycle of Tableau Cloud in your organization. The problem we are solving for customers is to provide comprehensive administrative care of Tableau Cloud for the fractional cost of a dedicated application engineer.

BASIC PRODUCT PLAN

The KeepWatch team at InterWorks works with your analytics infrastructure team to support the day-to-day operations of your Tableau Cloud solution.

- Quarterly service reviews, delivered by a product specialist
- Authentication support for Tableau Cloud
- SAML/SSO support for Tableau Cloud
- Advisory services (ticket-based support model for the customer's product owners to get help on anything not covered in the scope above - up to 10 tickets per 12-month contract period)

KeepWatch for Tableau Cloud

We'll manage your analytics platform, so you don't have to

Overview

We created KeepWatch for clients who need infrastructure support paired with a consultative approach. KeepWatch is expert-driven, anchored by SLA guarantees, and comes with tools included.

At InterWorks, KeepWatch is powered by many different teams - systems engineers working on global rotations, consultants and architects providing incisive guidance on the long-term health of the supported products, and engagement specialists who are checking in with the customer periodically to make sure everything is on track. When you are a KeepWatch customer, you've hired an entire practice to fill a role in your organization for a fraction of the cost of an FTE.

KeepWatch for Tableau Cloud takes that philosophy above and applies it to the lifecycle of Tableau Cloud in your organization. The problem we are solving for customers is to provide comprehensive administrative care of Tableau Cloud for the fractional cost of a dedicated application engineer.

STANDARD PRODUCT PLAN

The KeepWatch team at InterWorks works with your analytics infrastructure team to support the day-to-day operations of your Tableau Cloud solution.

- Quarterly service reviews, delivered by a product specialist
- Authentication support for Tableau Cloud
- SAML/SSO support for Tableau Cloud
- Data connection support for Tableau Cloud
- 3rd party integration support for Tableau Cloud
- Comprehensive lifecycle support for 1 or more dedicated Tableau Bridge instances, including continuous monitoring, troubleshooting, patching, and upgrades
- Advisory services (ticket-based support model for the customer's product owners to get help on anything not covered in the scope above - up to 20 tickets per 12-month contract period)

Assist

Direct access to data experts and answers right when you need them across your entire data stack

Overview

Monitor challenges, maximize performance, increase uptime and deliver a dependable and trusted analytics platform, knowing InterWorks' experts are standing by and ready to help you navigate challenges both expected and unforeseen. You can boldly leverage the best solutions and create the best analytics experiences for stakeholders, trusting that our support will be there to smooth and safeguard your path forward.

Assist by InterWorks is your on-demand access to experts. Through one-on-one consultations right when you need, our Assist team applies their unmatched breadth and depth of expertise to help walk you through any data challenge you may be facing.

Whether you're facing data engineering obstacles, dashboard difficulties or something in between, Assist can help you move forward. .

Reasons to reach out

- Tableau filtering, quick filters, action filters
- Calculations, LODs, order of operations, table calculations
- Functions, syntax and troubleshooting calculation logic
- Dashboard performance and behaviour
- Tableau Server performance, setup, permissions and content
- Best practices, visual analytics principles and UI advice
- Iconography and UX advice
- Data integration, structure, compiling and aggregation
- Informal training and 1:1 sessions
- Informal strategic planning and support
- Data pipeline and ingestion support